



UPJ GOVERNANCE COURSE AUGUST-SEPTEMBER 2024

OVERVIEW OF THE COURSE

The UPJ Governance Course for Synagogue Board Members and potential Board members will provide participants with an understanding of fundamental compliance and performance related roles and responsibilities of board members. The focus will be in the areas of:

1. Jewish values and roles of the rabbi, staff, and the board.
2. Governance and the role of board members, including legal responsibilities, compliance and risk management
3. Financial planning and performance management; strategy and operational implementation
4. Board recruitment and induction; maximising the effectiveness of the Board

WHO SHOULD ATTEND

The course is designed for members of synagogue boards, especially members with little experience in not-for-profit organisational management.

UPON COMPLETION OF THIS COURSE, YOU WILL BE ABLE TO UNDERSTAND:

- > The key duties and responsibilities of board members in the not-for-profit environment.
- > The interaction of Jewish values and board management functions related to rabbis and staff.
- > Processes for building an effective, purposeful Board
- > The role of Board members in overseeing strategy formulation and risk management
- > The nature of financial statements for not-for-profit organisations.

You will also have the opportunity to build a network of board member contacts across the UPJ for long-term communication and collaboration.

WHAT TO EXPECT

- > Participants should expect to attend all sessions and participate in discussions.
- > Approximately one-hour preparation before each session, mainly reading materials to facilitate group interaction and discussion.
- > Conduct a case study-based project with colleagues to utilise skills and knowledge developed during the course

The course will be taught in an interactive manner by our facilitator, David Fishel from Positive Solutions, who has extensive experience in the not-for-profit sector, and led a previous UPJ governance program in 2022. He will be supported by several highly experienced members of the UPJ community, who will contribute to discussion of governance and management of boards in a Progressive Jewish context.



THE MODULES

Session 1: Jewish values and roles of the rabbi, staff, and the board

- > Introduction to overall program
- > Introduction to the development of Progressive Judaism
- > Introduction to the UPJ and Jewish organisations in Australia, New Zealand and Asia
- > Understanding your local community and needs
- > Roles of the rabbi, staff, and the board
- > Trends in not-for-profit governance
- > Key governance challenges and opportunities

Session 2: The role of board members, including legal responsibilities and compliance

- > The functions of the board
- > Legal responsibilities and compliance
- > Risk assessment and management
- > Case study and discussion
- > Case study set-up

Session 3: Financial planning and organisational strategy

- > Overview of financial planning and management
- > Financial hot-spots – where do the risks lie
- > Introduction to strategic planning for the synagogue
- > Setting targets and performance monitoring
- > Case study discussion

Session 4: Board recruitment and effectiveness

- > Routes to the Board, identifying Board prospects
- > Recruitment, induction and development
- > Optimising Board and committee meetings
- > Measuring board performance
- > Case study discussion
- > Program wrap-up